NewsRelease

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September 01, 2004

IMMEDIATE AMENDMENTS RECOMMENDED TO CAIS (CANADIAN AGRICULTURAL INCOME STABILIZATION) PROGRAM

- - -

BSE Ruminant Task Force Recommendations Released, Manitoba Continues to Lay Groundwork to Sustain Industry: Wowchuk

BRANDON—As part of an update to producers on provincial BSE initiatives, Agriculture, Food and Rural Initiatives Minister Rosann Wowchuk today recommended to the federal government that immediate changes must be made to the Canadian Agricultural Income Stabilization (CAIS) program in order to free up $65 million in approved federal-provincial funding that could be used to assist ruminant producers struggling with cash flow challenges resulting from BSE.

The minister also released recommendations from the BSE Ruminant Task Force and committed the province to continue laying the groundwork necessary to ensure a future for the province's beef and ruminant industries in a post-BSE era.

"Money sitting in the bank does nothing for farmers struggling on the land," said Wowchuk. "We need to ensure our programs are working for those who need it most and, so far, CAIS has not been working for our beef and ruminant producers. Changes need to be made."

In addition to recommending changes to the CAIS program, the province will continue to lay the groundwork for the long-term sustainability of the industry by:

- **expanding slaughter capacity** through $2.25 million in infrastructure supports, slaughter and packer incentives, and strengthened support services for new or expanding slaughter facilities;
- **increasing surveillance and testing** through a $442,000 expansion to the provincial veterinary laboratory at the University of Manitoba to ensure Manitoba remains a leader in meeting its BSE testing targets and $300,000 in support to veterinary districts for infrastructure and equipment upgrades;
- **increasing marketing and product branding efforts** in order to strengthen local markets and open doors to new markets; and
- **continuing the work of rural support teams** who assist farm families and rural communities in dealing with the impacts of BSE and other rural challenges.

"The BSE task force has provided the provincial government with valuable direction on how best to move forward in sustaining and securing a beef and ruminant industry in Manitoba, and I want to thank Mr. Ron Bell and the committee for their work," said Wowchuk. "BSE has become a North American reality and provincially we need to work with industry groups to continue generating creative opportunities in response to what has become a national and international challenge.

"Since BSE was discovered in a single cow last May, over $100 million in provincial support has flowed to producers through direct payments and low interest loans. As we continue to move through the second year of the crisis, we need the federal government to take a stronger leadership role in assisting producers and in supporting Manitoba initiatives to expand our slaughter capacity. Amending CAIS to improve cash flow is a good first step."

The minister noted that the Manitoba Agricultural Credit Corporation's (MACC) BSE Recovery Loan Program remains available to beef and ruminant producers experiencing BSE-related financial setbacks. The program is offered in two stages with part one providing up to $50,000 financed over two years at reduced interest rates. The second stage offers additional funds of up to $25,000, to a program cap of $75,000 to be financed over up to 10 years at MACC's prevailing corresponding rate. These loans have been used to pay feed bills, utilities, operating costs, property taxes and related trade accounts.

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RETURN

Province of Manitoba

Ruminant Task Force

Final Report to the Minister of Manitoba Agriculture, Food and Rural Initiatives on Farmer and Industry Consultations

LETTER OF TRANSMITTAL

Ron Bell
Chair, Ruminant Task Force
Box 386, Birtle, Mb.
R0M 0C0

June 2004

The Hon. Rosann Wowchuk
Minister of Agriculture, Food and Rural Initiatives

Dear Minister Wowchuk,

We are pleased to submit our report on the farmer and industry consultations, we undertook on your behalf, to enhance Manitoba's ruminant industry. We believe this report summarizes our discussions with stakeholders and some suggestions we identified from those discussions. We also included considerations affecting actions that may be taken.

We wish to acknowledge the overall quality of the presenters and their commitment to improving Manitoba's livestock industry. We also appreciate the support shown by all provincial staff involved in our undertaking. Their input was extremely valuable.

It has been a pleasure to undertake this challenging assignment.

Respectfully submitted,

Ron Bell
Chair, Ruminant Task Force

PREFACE

Ruminant Task Force Members:

Ron Bell, chair – Bell is a grain producer from western Manitoba, the mayor of Birtle and the urban vice-president of the Association of Manitoba Municipalities.

Dr. Brian Oleson – Oleson is the University of Manitoba's Department of Agriculture and Agricultural Economics agribusiness chair in co-operatives and marketing.

Art Petkau - Petkau is a feedlot operator in the Morden area who has many years experience in the cattle industry. He has also served as president of the Manitoba Cattle Producers Association.

Scott Tibble – Tibble is a young farmer, cattle producer and businessman from northwestern Manitoba.

Carol Masse - Masse is a commercial broiler producer in the Fannystelle area. She is a member of the Manitoba Farm Mediation Board, Farm Lands Ownership Board and an advisor to the Manitoba Farm and Rural Stress line.

Mandate

To listen to farmers as well as industry stakeholders, and report back to the minister on an ongoing basis, our insights, as well as possible initiatives on:

- How to effectively increase the province's slaughter and processing capacity
- How to expand and diversify the province's national and international markets
- How to add value to current provincial meat and ruminant products
- Best practices for expanding and capturing niche markets.

The Task Force met many stakeholders over a number of months this winter and spring. Although our focus was intended to be on long-term suggestions for the ruminant livestock industry in Manitoba, it was often difficult to look beyond the ongoing B.S.E. crisis for insights on improving the industry in the future. That being said we were immediately impressed with the willingness of all stakeholders, especially the farmers and ranchers, to explore alternative ways of doing business in the future.

There were a number of points that frequently came up. Many stakeholders expressed a commitment to lessen reliance on American markets for beef and other ruminant animals and products. Most believed that Manitoba needs more slaughter capacity, but disagreed what that should look like. It was definitely suggested there is need for more federally inspected slaughter plants in Manitoba. Most suggested that slaughter and processing plants in Manitoba would have to stay under the radar screen of the large multinational corporations if they were to succeed. The

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only other alternative would be to attract one of these large corporations to our province. Many thought there was an opportunity for smaller provinc ially inspected plants to expand, but were concerned about how difficult that process could be for them. Another common suggestion was that we should optimize the amount of Manitoba grown meat consumed in Manitoba.

A number of stakeholders felt there sho uld be harmonization of provincial slaughter standards to enable enhanced inter-provincial trade. We also heard many suggestions regarding B.S.E. testing.

Concerns over marketing or lack of marketing abilities within the slaughter and processing industry in Manitoba were also brought up. There are fears that it may be difficult to avoid falling into old patterns of cattle movement when the border opens, although that concern has lessened as time has gone on and the border remains closed.

Some felt the provincial government had a greater role to play in feasibility studies, marketing support or development, and venture capital. There were suggestions that Manitoba Agriculture, Food and Rural Initiatives (MAFRI) needs to assess how they deal with farmers and ranchers. There were also some questions about the effectiveness of having international trade component for agriculture moved from MAFRI to Intergovernmental Affairs and Trade (IGAT).

The farm associations representing bison, elk, goats and sheep stated there was no proof that B.S.E. could be found in their species. We heard that goats were affected mostly by the loss of local slaughter around the province due to increased demand for beef slaughter. Sheep and lamb producers may have been hit the hardest by BSE because the sheep industry in Manitoba is overly dependent on the U.S. and Ontario markets and these two markets do not accept the same weight lambs. Bison slaughter occurred largely in North Dakota and is not readily available in Manitoba.

Perhaps the most common concern was that there is not enough understanding of the whole industry by individual parts of it. Farmers and ranchers need to better understand what is required as a finished product. Abattoir owners need a better grasp of marketing. Processors need to be able to provide the quality needed at a guaranteed price to retailers. It appears there is a great need for the entire industry from the cow/calf farmer right through to the retailer to sit down and determine where the Manitoba industry needs to go.

In putting together this report many people had a role in helping the task force and we wish to acknowledge their commitment. Appendix I includes the many individuals who took the time to meet with us in person. Appendix II includes those who sent us presentations. We want to particularly thank Michael Sykes, Agricultural Representative for the Eastern/ Interlake Region (MAFRI) for his work in co-ordinating the efforts of the Ruminant Task Force. His work was truly professional. We would also like to acknowledge the clerical work of Wendy Wildeman, Linda Dola and Lesley Hoban for their assistance in compiling this report.

We are pleased to submit this summary of what we heard, with what we suggest, along with considerations affecting actions that may be taken.

Ron Bell
Chair, Ruminant Task Force

1. LONG TERM STRATEGIC PLANNING FOR BEEF AND OTHER RUMINANTS:

What We Heard:

From the onset of meetings with industry stakeholders we heard of a willingness to do business differently in the future, and look to previously untapped opportunities.

The BSE crisis pointed out that we were all vulnerable to the severe economic and social impacts of border closures. While no one suggested that we could ever thrive without export markets; many pointed out the need to optimize our industry within Manitoba and Canada. Suggestions included finishing more animals, forage finished animals, value added processing, new age slaughter facilities such as smaller plants shipping to larger processing facilities and mobile slaughter facilities, etc.

What We Suggest:

We believe that a strategic planning conference on the future course of our beef industry would greatly benefit the Province of Manitoba. This strategic planning conference should take place within the year, while the impact of the BSE crisis is still fresh within our minds. It is of the utmost importance that the whole industry be involved in this endeavor. Stakeholders should include farmers, ranchers, buyers, meat processors, marketers, financial institutions, abattoir owners, retail trades, appropriate MAFRI staff, and Trade Department staff and the appropriate Federal government Staff.

The bison, sheep, elk and goat sector would also benefit from participating in a strategic planning process for their respective species.

Considerations:

Time is of the essence and stakeholders would have to act expediently while there is still a clear memory of the crisis and a desire to change. It may be difficult to get complete industry representation at this conference and therefore buy-in from the entire industry may be reduced.

It is critical that the resulting strategic plan has industry wide acceptance.

2. Orientation Program for Stakeholders wishing to Create or Expand Slaughter Facilities in Manitoba

What We Heard:

It appears there are numerous groups or individuals looking to either expand or build a slaughter plant. These groups or individuals have a varying degree of knowledge of what is required to make success of a slaughter plant. It is not inconceivable that a number of those pursuing plants may ultimately give up after spending significant money, frustrated with a process they never fully understood.

What We Suggest:

We believe many of those groups are in the early stages of development and would benefit from a MAFRI sponsored facilitated orientation session that would prepare them for all of the complexities involved with developing a plant. This would either better prepare them to succeed or allow them to retreat without wasting time or money.

When meeting with the Manitoba Food Processors Association (MFPA) we were introduced to their program, which lays out some steps to go through to get a product to market. The steps laid out by MFPA include: market research, organizing your business, protecting the consumer, developing a quality product, food safety, packaging and labeling, manufacturing strategies, strategic marketing, distribution, promotion, pricing, and business planning. We believe these are some of the topics that could be covered at an orientation session with others more specific to the meat industry added.

It might be reasonable to require applicants for provincial programs to participate in these sessions.

Considerations:

This program would require a sourcing of resources and personnel, which could include industry and government partners.

3. MARKET SUPPORT PROGRAM:

What We Heard:

The majority of presenters who met with the task force felt a sound marketing plan should be the first step in creating a slaughter facility.

A number of current abattoir owners are placing expansion plans in abeyance because they are not confident that they have the necessary marketing skills to sustain an expanded facility.

The task force also heard that there are many niche market possibilities for value-added products in the Pre-Cook and Serve and Ready to Eat (RTE) markets.

Provincial marketing and trade show promotional programs which have just begun to show benefit have been cancelled because of the pressure to direct limited resources towards newer trade show venues.

It is also difficult to maintain consistency of marketing and promotional programs, when governments and their priorities change.

A number of presenters expressed concern regarding the transfer of International Trade for agriculture to the Department of Inter-governmental Affairs and Trade. It was felt that this move was a loss of focus on the international marketing of agricultural commodities.

What We Suggest:

Those companies or individuals likely to proceed in the value added area in Manitoba are smaller in size and would greatly benefit from the resources provided by a marketing support program.

A marketing support program could be organized along the lines of the Beef Information Centre with a Manitoba focus. This program would incorporate existing resources regarding market intelligence with a provincial and industry partnership team focused on market research and development. This could be initiated through the strategic planning session which would identify priorities.

The province should commit to long term core funding to support this market program

Strong consideration should be given to the return of the responsibility for international trade for agricultural commodities to Manitoba Agriculture, Food and Rural Initiative (MAFRI).

Considerations:

Identifying and coordinating industry and provincial resources.

4. SMALLER ABATTOIRS EXPANSION:

What We Heard:

A number of provincially inspected slaughter plant owners felt they lacked skills, knowledge, and training in the area of market development. In order to succeed at plant expansion and upgrading they indicated that they should secure the necessary markets first.

They stated that expansion and upgrading at this time could expose them to a high risk of loss of capital investment once the U.S. border re-opens.

They expressed that the present provincial financial loan programs directed at expansion and upgrading were not an effective enough incentive to invest in new infrastructure.

Paperwork and regulations surrounding plant upgrading and expansion required by various levels of government was considered onerous, daunting and a barrier to expansion.

Under their present provincially inspected status, plants are not allowed to market any of their products outside of Manitoba. They requested that the province pursue the federal and various provincial governments in an effort to speed up the harmonization of inter-provincial rules and standards for provincial slaughter plants.

What We Suggest:

Initiate a Marketing Program which would provide marketing resources to these abattoirs.

Those individuals or facilities desiring to expand or upgrade be encouraged to participate in an industry orientation program prior to proceeding with their plans. This program would provide training in the areas of marketing, government regulation and business planning.

The provincial government should continue to pursue the federal and other provincial governments with respect to inter-provincial harmonization of regulations and standards regarding provincially inspected plants.

The province facilitate a program for the upgrading of slaughter plants from Provincial Inspected status to Federal Inspected status.

Upgrading to federal plant status and increasing the kill capacity of provincially inspected plants would help meet the demand for slaughter spaces for all ruminant species, including bison, sheep/lamb, goats, and elk. These species have had their access to slaughter plants in Manitoba significantly reduced since the lone case of BSE in Canada.

Considerations:

Often heard through the course of the Ruminant Task Force deliberations was the need for smaller slaughter plants to stay below the radar screens of large multinational slaughter plants and retailers by focusing on niche markets.

We continually heard how critical it is for plants to secure markets prior to any expansion.

5. LARGE FEDERALLY INSPECTED PACKING PLANT:

What We Heard:

On a number of occasions, we were told of the need for a large scale federally inspected slaughter plant for Manitoba. It was stated that this would give Manitoba access to national and international markets.

It was also suggested that the presence of such a plant would give Manitoba farmers more confidence to expand and possibly further background or finish their animals.

We heard that a large facility would open up more opportunities for the processing industry to create value-added products and develop export markets.

We also heard that there needs to be an economic incentive for a large industry player to locate a slaughter facility within Manitoba.

What We Suggest:

We suggest that the province actively solicit a large scale multi-national slaughter plant to locate within Manitoba. If this is not feasible, we should co-operate with the Province of Saskatchewan to pursue a shared slaughter facility.

The province should continue to encourage current on-going initiatives regarding slaughter plants within Manitoba. It is important that these plants stay below the radar screen of the large multinational companies and focus on niche markets

6. MADE IN MANITOBA LABEL:

What We Heard:

We heard often about the merits of marketing branded Manitoba meat products such as grass-fed, hormone-free, or specific breeds. It was suggested that a process be set in place which would provide guaranteed quality with full traceability for these products from farm to plate.

Presenters informed us that there was economic potential for value chain systems that could also provide full traceability. There appears to be a strong interest in the development of meat products that can be supported by certified production practices and subject to audit.

What We Suggest:

Set out criterion for a Manitoba Label and establish guidelines at the strategic planning session as in recommendation #1.

The requirements of a "Made in Manitoba" label should focus on food safety with complete traceability to the farm of origin.

Value chain systems should also be on the agenda for the strategic planning session as described in recommendation #1.

Considerations:

Products qualifying under the "Made in Manitoba" label criteria be promoted as a Manitoba label only in Manitoba.

Who is to police the integrity of the Manitoba label? What are the costs associated with maintaining and policing such a label?

7. VENTURE CAPITAL:

What We Heard:

Substantial public Venture Capital is currently available to the beef industry in such provinces as Ontario and Alberta.

There is a definite need for Venture Capital within the Manitoba livestock industry in order to facilitate expansion and further processing.

What We Suggest:

We agree that there is a need for access to Venture Capital to facilitate industry growth within our province.

Venture Capital could be made available in the form of loan guarantees, buy-back investment provisions and tax incentives.

Considerations:

Other jurisdictions have deeper pockets and have the financial ability to sustain substantial financial infrastructure investments. Manitoba, on the other hand, needs to choose the best management practice options in order to get the biggest bang for our limited investment dollar.

8. PROVINCIAL/FEDERAL INSPECTION AND GRADING:

What We Heard:

There is an urgent need for inter-provincial harmonization of rules regarding provincially inspected slaughter plants outside of the federally inspected requirements.

It is important to ensure continuing high quality processing and health standards within all provincial plants.

It is very likely that higher standards will be imposed by regulatory authorities in light of increasing global food safety requirements.

What We Suggest:

The province should continue to pursue interprovincial harmonization of regulations regarding provincially inspected plants.

The province should ensure that provincial inspection capabilities for health and quality assurance be increased with new plant development.

Considerations:

There would be added costs due to the implementation of increased inspections. It may be challenging for smaller abattoirs to meet financial obligations due to increased compliance requirements.

9. SUPPORT FOR THE READY TO EAT INDUSTRY:

What We Heard:

There are current opportunities for Manitoba processors to expand into value-added Ready to Eat (RTE) products.

Changing consumer patterns are indicating that there is real market potential for RTE products. The poultry industry has already embraced RTE as a significant component of its retail strategy.

What We Suggest:

In order to facilitate the development of RTE products, interested processors would require assistance in the areas of market development (i.e. market support) and food research (i.e. Food Product Development Laboratory).

Venture capital would also have to be made available to RTE processors with some of this capital being facilitated through government initiatives.

10. BSE TESTING:

What We Heard:

1. Test all animals.
2. Test all animals over 30 months.
3. Test specific animals at specific plants for specific markets.
4. That there are various tests available, some inexpensive, some rapid.
5. Science indicates that the removal of Specified Risk Materials (SRM) is an adequate practice.
6. Increased BSE testing could endanger our minimal risk status as a nation if more positives were to show up.
7. International customers are unlikely to assume the added cost of testing.
8. It was suggested that the Europeans and Japanese may be looking at getting out of testing every animal for B.S.E.
9. The United States, our largest trading partner does not require every animal to be tested for B.S.E.

What We Suggest:

That Canada continues to follow the BSE testing guidelines as laid down by the Canadian Food Inspection Agency (CFIA).

Considerations:

When testing animals for specific markets are you implying that untested animals are unsafe?

If Canada implements mandatory testing for all animals and the U.S. maintains its current testing protocol, this would create cross-border trade problems.

11. EXTENSION PROGRAMS:

What We Heard:

There is a need for a change in the way the province deals with ranchers and farmers in regards to targeting extension information and programs. It was felt that extension programs should be client specific with a clear focus on the needs of defined clients. Examples cited included specific programs for large feedlot operators, or small cow/calf operations or large cow/calf operations as opposed to general programs which would include all types of beef cattle operations.

It was felt that this approach would better serve all sectors of the provincial ruminant industry.

What we suggest:

Develop extension programs in collaboration with specific client groups targeting their exact needs.

Appendix I

Summary of Consultations

Friday, February 10th, 2004

1. Ms. Carolynn Osborn, Policy Economist, MAFRI, Winnipeg

2. Ms. Dianne Roberts, Livestock Product Development Specialist, MAFRI, Winnipeg

Monday, February 16th, 2004

1. Mr. Calvin Vaags, Rancher and Feedlot Owner – Dugald

2. Hartney Slaughter Plant Initiative
   - Mr. Bruce Evans, Mayor, Town of Hartney
   - Mr. Claude Martin, Cattle Farmer, R.M. of Cameron, Hartney
   - Ms. Lori Taylor, Community Development Officer and Councillor, Hartney

3. Ranchers Choice Beef Co-op
   - Mr. David Reykdal, Rancher, Proponent, Vogar
   - Mr. Blair Olafson, Rancher, Proponent, Lake Manitoba Narrows

Tuesday, February 17th, 2004

1. Manitoba Sheep Association
   - Sarah Lewis, Chairperson, Manitoba Sheep Association, Kirkella
   - Dr. John Hammerton, Producer, Anola
   - Roy & Dianne Leitch, Lamb Feedlot, Brandon
   - Eugene Sabot, Purebred Sheep Breeder, Richer
   - Wray Whitmore, Sheep Specialist, MAFRI, Winnipeg

2. Manitoba Goat Association
   - Melanie Hooker, President, Manitoba Goat Association, Dauphin
   - Greg Bell, Vice President, Manitoba Goat Association, Ethelbert
   - Monica Griffith, Goat, Sheet and Cattle, Elie
   - Pat Farquhar, Secretary, Birtle
   - Wray Whitmore, Goat Specialist, MAFRI, Winnipeg

3. Manitoba Bison Association
   - Mr. Ken Overby, President, Manitoba Bison Association, Inwood
   - Mr. Ken Johnson, Director, Manitoba Bison Association, Elkhorn
   - Mr. Ray Salmon, Bison Specialist, MAFRI, Winnipeg

4. Manitoba Milk Producers
   - Mr. William Swan, Chairman, Warren
   - Mr. John Bannister, Director, Lockport

Thursday, February 26, 2004

1. Manitoba Elk Association
   - Mr. Ed Harmes, Vice President, Mather
   - Mr. Al Haverstick, Elm Creek
   - Mrs. Lou Farmer, Stonewall

2. Credit Union Central
   - Mr. Bernard Carling, Director, Lending Services, Winnipeg
   - Mr. Brad Magnusson, Agricultural Credit Consultant, Winnipeg
   - Mr. Doug Shumilak, Credit Analyst, Winnipeg

3. MAFRI
   - Ms. Carolynn Osborn, Policy Economist, MAFRI, Winnipeg

4. Manitoba Slaughter Processing Association
   - Mr. Jim Holmes, Carman Meats, Carman
   - Mr. Pat Haywood, B.J. Packers, Beausejour
   - Mr. Lee Perrault, Prairie Abattoir, Portage la Prairie
   - Mr. Garth Jarvis, Jarvis Meats, Gladstone

5. Opportunities in Rendering
   - Dr. Catherine Buckley, A.A.F.C., Brandon
   - Ms. Kelly Beaulieu, Manager, R & D, PAMI, Portage la Prairie

6. New Generation Co-operatives
   - Mr. Alan Carson, Senior Policy Economist, MAFRI, Winnipeg

Friday, February 27th, 2004

1. Peak of the Market
   - Mr. David Jefferies, Chairman, Portage la Prairie

2. Manitoba Pork Marketing
   - Mr. Perry Mohr, C.E.O. Winnipeg

3. Auction Marts
   - Mr. Rick Wright, Heartland Livestock Services, Brandon
   - Mr. Cliff Penno, P. Quintaine & Sons Ltd., Brandon

4. Canadian Imperial Bank of Commerce
   - Mr. Barry Smith, National Director, Agriculture Division, CIBC, Winnipeg

5. Manitoba Agriculture, Food and Rural Initiatives
   - Dr. Allan Preston, A/Assistant Deputy Minister, Winnipeg

Thursday, March 11th, 2004

1. Dr. Brian T. Oleson, Professor, Agri-Business, Chair in Co-operatives and Marketing, Department of Agribusiness and Agriculture Economics, University of Manitoba, Winnipeg

2. To-Le-Do Food Services
   - Mr. Marlin Van Robaeys, Plant Manager, Winnipeg

3. Beef Information Centre
   - Mr. Glenn Brand, Director of Marketing, B.I.C., Calgary

4. Manitoba Cattle Producers Association
   - Mrs. Betty Green, President, Fisher Branch
   - Mr. Larry Sweitzer, Director, Hamiota

5. Mr. Robert Krentz, Rancher, Pansy

6. Canadian Cattlemen's Association
   - Mr. Dennis Leycraft, Executive Vice President and Chair of National Round Table, Calgary

7. D.M.B. Qu'Appelle Slaughter Plant – Saskatchewan
   - Mr. Andre Lizée, Secretary/Treasurer & Controller, D.M.B. Food Processors Canada Inc.; President, A.L. Management Group, Regina
   - Mr. Jim Douey, Business Development Manager, Abbott Labs, Mississauga
   - Dr. Benny Bennett, C.E.O., D.M.B. Food Processors Canada Inc., Ireland
   - Mr. Bob Buckle, Associate, A.L. Management Group, Regina

Friday, March 12th, 2004

1. Mr. Owen McAuley, Producer, McAuley

2. Ms. Anne Dunford, Canfax, Calgary, Alberta

3. Mr. Bob Hoffman, Executive Director, MRAC, Winnipeg

4. Value Chain
   - Mr. David Price, President, Sunterra Farms, ACME, Alberta

5. Keystone Agricultural Producers
   - Mr. David Rolf, President, KAP, Elgin
   - Mr. Ian Wishart, Executive Member, KAP, Portage la Prairie

6. Mr. Bob Ward, Manager, Marketing & Farm Business Mgmt., MAFRI, Winnipeg

Monday, April 12th, 2004

1. Vantage Foods (MB) Inc
   - Mr. Tony Martinez, Service Centre Manager, Winnipeg

2. Manitoba Chefs Association
   - Chef Hans Schweitzer, c.c.c., President, Manitoba Chefs Association, Winnipeg

3. To-Le-Do Food Service
   - Mr. Jeff Beaucage, Senior Sales Executive, Winnipeg

4. Manitoba Food Processors Association
   - Mr. Dave Shambrock, Executive Director, Manitoba Food Processors Assoc., Winnipeg

5. U.S. Consulate – Winnipeg
   - Mr. Todd P. Schwartz, Consul and Principal Officer, Winnipeg

Tuesday, April 13th, 2004:

1. Direct Marketing Experiences
   - Mr. Randy Tkachyk, Cow/Calf Operator, Sundown
   - Mr. Jim Lintott, Custom Grazing, Hazelridge

2. Country Meat and Sausage
   - Mr. Robert W. Jowett, Owner, Blumenort

3. Manitoba Restaurant Association
   - Mr. John McMillan, Past President, M.R.A., Winnipeg and General Manager Hy's Steak Loft, Winnipeg

4. Beef Information Centre
   - Mr. Glenn Brand, Director of Marketing, Calgary, Alberta

5. Mr. Lasby Lowes, Manager, Agriculture Marketing Farm & Business Management, Manitoba Inter-Governmental Affairs and Trade, Winnipeg

6. Mr. Bob Ward, Manager, Market Development & Promotion, MAFRI, Winnipeg

Monday, April 26th, 2004

1. Canadian Consulate in Dubai, United Arab, Emirates
   - James G. Hannah, Consul and Trade Commissioner (Agri-Food), EAR

2. Canadian Council of Grocery Distributors
   - Mr. Bryan Walton, Western Vice President, Calgary

3. Local Marketing Challenges
   - Mr. Warren McKennitt, Cattle Farmer, Morden

4. Mr. Harvey Dann, Cattle Buyer/Dealer, Stonewall

5. Cow/Calf Producers
   - Mr. Scott Atkins, Ranch Manager, Hytek, La Broquerie
   - Mr. Henry Rosing, Ranch Manager, EUR Ranch, Lake Francis

Tuesday, April 27th, 2004

1. Canadian Project Management Team
   - Mr. Ken Lewis, Director, Canadian Project Management Team Inc., Winnipeg
   - Mr. H.J. Funk, Director, Canadian Project Management Team Inc., Winnipeg

2. Mr. Jim Laws, Executive Director, Canadian Meat Council, Ottawa

3. Mr. Ted Haney, President, Canadian Beef Export Federation, Alberta

4. Forage Fed Beef and Sheep
   - Mr. Bragi Simundsson, Cattle and Sheep Farmer, Arborg
   - Mr. Henry Nelson, Executive Director, Manitoba Farm Mediation Board, MAFRI, Winnipeg

5. Bio Diesel
   Eastern European Markets
   - Mr. Tom Nevakshonoff, MLA Interlake, Fisher Branch

6. Agriculture and Agri Food Canada
   - Mr. John Ross, Assistant Director, Red Meat Analysis Section, Market Industry and Service Branch, Ottawa

Friday, June 18, 2004

1. Bio Diesel
   - Mr. Bryan Yusishen, Director, Agri-Energy, Energy, Science & Technology, Winnipeg
   - Mr. Jeff Kraynyk, Energy Policy Analyst, Energy, Science & Technology, Winnipeg

2. Canadian Food Inspection Agency
   - Dr. George W. Luterbach, DVM, Chief Veterinarian, Animal Health and Production, Western Program Network, Winnipeg

3. Dr. Edward Tyrchriewicz, P.Ag., Acting Director and Professor, Asper School of Business, Faculty of Management, Transport Institute, University of Manitoba, Winnipeg

Appendix II

Summary of Correspondence and e-mails

1. **Jan. 28th, 2004:** Thomas A. Judd – McAuley
2. **Feb. 18th, 2004:** Dr. John Hammerton – Dugald
3. **Feb. 23rd, 2004:** Brian Hunt – MAFRI – Carman
4. **March 4th, 2004:** Ramona Bighetty
5. **March 4th, 2004:** Keith Rempel
6. **March 5th, 2004:** Charlie Shymko
7. **March 5th, 2004:** Anne Shaw – Solsgirth
8. **March 5th, 2004:** Gayne Baldwin, J & R Livestock Consultants Ltd.
9. **March 5th, 2004:** Mark Sloane – MAFRI
10. **March 6th, 2004:** Cliff Duke, P. Eng., Tantalum Mining Corp. Canada. Ltd.
11. **March 7th, 2004:** Lorna Wall
12. **March 7th, 2004:** Leo Vuignier – Cow/Calf Producer
13. **March 7th, 2004:** Nadine and Gilbert Gauthier
14. **March 10, 2004:** Scott
15. **March 11th, 2004** Fred and Chris Wiebe – Starbuck
16. **March 14th, 2004:** Ingrid Wilkinson – Virden
17. **March 16th, 2004:** Dave and Diana Hyde
18. **March 16th, 2004:** Claude Gregoire (C.H.T.)
19. **March 23rd, 2004:** Cedar Land Cattle Co.
20. **March 27th, 2004:** Dan Mazier
21. **March 28th, 2004:** Laura